DOCUMENT RESUME

ED 353 420 CE 062 839

TITLE	The New Tools of the Trade. A Report of the Conferences on Joint Labor & Management Sponsored Work-Based Education Programs.
INSTITUTION	Carnegie-Mellon Univ., Pittsburgh, PA. Center for Labor Studies.; Department of Labor, Washington, DC. Office of Work-Based Learning.
PUB DATE	91
NOTE	51p.; Green ink on green paper.
PUB TYPE	Reports - Descriptive (141)
EDRS PRICE	MF01/PC03 Plus Postage.
DESCRIPTORS	Career Development; *Continuing Education; *Cooperative Programs; Education Work Relationship; Employer Employee Relationship; *Inplant Programs; *Labor Education; Labor Relations; *Lifelong Learning; On the Job Training; Postsecondary Education; *Retraining; Unions

ABSTRACT

This report describes work-based programs that companies and affiliated unions have organized in lifelong learning and career development for their employees. The programs offer a variety of approaches in such areas as program content, target populations, methods for attracting participation, learning-related technologies, financing, and administrative structure. Programs described are the following: Enhanced Training Opportunity Program of AT&T and the International Brotherhood of Electrical Workers (IBEW); National Skill Development and Training Center (Chrysler-United Auto Workers); Career Development Program of Bell Atlantic, Communications Workers of America (CWA), and IBEW; Institute for Career Development (United Steelworkers of America and various steel companies); Pathways to the Future (U S West and CWA); Employment Security Partnership (BellSouth and CWA); the Brenlin Group; Alliance for Employee Growth and Development (AT&T, CWA, and IBEW); and Training and Retraining Program (Packard Electric and the International Union of Electronic, Electric, Technical, Salaried and Machine and Furniture Workers). Each program description includes a summary of the program's mission, scope of activities, access and marketing, environment, administration, and financing. (KC)

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A Report of the Conferences on Joint Labor & Management Sponsored Work-Based Education Programs:

THE NEW TOOLS OF THE TRADE

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Co-Sponsored by the Carnegie Mellon University Center for Labor Studies and the Office for Work-Based Learning, U.S. Department of Labor

July 1990 & 1991
Pittsburgh, PA

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THE NEW TOOLS OF THE TRADE

The balance of this century clearly promises an extension of the forces of change which accelerated rapidly over the last decade. The decline of communism, the development of potentially powerful economic alliances in Europe and the North-Central American continent, and a continually growing presence of southeast Asia in world markets will be among the major forces defining the new global order. It seems inevitable that economic performance will dominate military prowess in determining which nations' future standards of living will decline or prosper. For America, the direction and extent of change will continue to be challenged by growing external economic pressures and the capacity to overcome institutional lethargy.

In traditional theory, command of money, machinery, materials, management and manpower defined economic success. In the modern global economy in which we compete, however, it is clear that finance, technology and natural resources are virtually commodities which can be acquired by anyone and used anywhere. They now represent merely the ante for sitting at the table; the advantage in playing the hand in today's highly competitive environment accrues to those institutions with the most effective organizational systems and human resources. Effectiveness, in turn, is measured by the capacity to adapt quickly to rapidly changing consumer preferences while maintaining premier quality and superior service at competitive prices.

The contemporary precepts of comparative advantage now emphasize responsiveness, flexibility and skills from people and their organizations. This is critically important for American firms and workers, who already face significant disadvantages.

American firms and workers must compete with low-wage producers in rapidly growing newly industrialized nations. While wages and the standard of living in those countries will increase over time, the gap may also close through declining standards in the U.S. The choice presents a serious dilemma: lower standards or continuing erosion of markets and jobs.

American firms and workers have traditionally borne the principal responsibility for providing for their health care needs; in fact, they have also subsidized to some extent the needs of others. Increased costs and the magnitude of our uncovered population have taken on national attention, but little regard has been given to the impact of health care costs in the arena of international competition. The report of a national commission on health care, for instance, found that the cost of providing health care insurance for a U.S. autoworker employed in a typical "Big Three" plant exceeded $4,000 per year, while the cost for a similar plant in Japan was less than $1,000 per employee. These competitive disadvantages are not strictly international in scope; the study also found that differentials in benefit costs provide a $500 advantage per car to U.S. based facilities of Japanese companies over a similar domestic corporation's production facility.

The magnitude of the social problems presented by our private health care system warrants attention and change. However, the principal focus to date has been on mandating employment-based insurance, which can only exacerbate already severe competitive disadvantages. We can no longer afford to delude ourselves that "sending the bill to business" does not mean lower wages and living standards. A more rational system of financing health insurance must be combined with more efficient delivery, higher quality, universal accessibility and cost containment.

Our nation's educational system has come under serious criticism for failing to produce qualified young people who are prepared to make a successful transition to the work environment. Comparisons of test scores in foundation skills such as reading and arithmetic consistently show inferior performance of American students to their foreign counterparts.

When combined with increasing global economic pressures, these and other significant factors challenge the future of American workers and their firms. The obstacles are not insurmountable, but they do require substantial rethinking, adjustment and, where necessary, overhaul. The principal alternatives were framed by a national commission in its now two year old report "America's Choice: high skills or low wages!".

The commission reported that we are undergoing a third industrial revolution characterized by technology, communication and education. The report also stated that the key to success will be high performance work organizations, which are distinguished by front-line workers taking on greater responsibility and using their own judgment in making operational decisions. The commission found that high performance organizations are more prevalent in other nations and that, despite their advantages, the vast majority of domestic firms have no plans to embrace them and consequently do not invest in training of front-line workers for these new systems.

In a global economy characterized by rapidly accelerating technological change, the emergence of new sources of competition and the power of consumer options, institutional lethargy in developing world class production and service organizations will dictate America's choice through economic evolution.

It seems perhaps obvious that high performance organizations would benefit firms and workers through increased economic potential, job security and the satisfaction of personal development. However, moving towards such systems is not easy. In overcoming the natural inertia of people and institutions, the move towards highly involved systems requires a significant commitment of resources from the firm in terms of funding and from the individual in terms of time and effort. The focus of those commitments must begin with work-based education.

A number of companies and their unions have taken the lead in organizing programs which look toward the challenges certain to confront society. These programs are developing the paradigms for redefining an evolving element of our education system, as well as in reshaping attitudes towards lifelong learning and career training.

In July of 1991 the Center for Labor Studies at Carnegie Mellon University and the U.S. Department of Labor sponsored a second annual meeting of directors representing work-based education programs in the automotive, telecommunications, metals and food industries. That meeting and the one held a year earlier have helped to establish a forum for sharing information about their respective programs, approaches and concerns. The report which follows outlines the objectives and strategies which they have implemented.

These programs offer a variety of approaches in areas such as program content, target populations, methods for attracting participation, learning-related technologies, financing and administrative structure. There is no intent here to evaluate the appropriateness of varying approaches; we assume that they must be tailored to the needs, capacities and histories of the individual parties.

Our primary interests in providing an overview of these programs are twofold. First, they offer valuable lessons and experiences to others considering development of work-based educational activities. These programs have to a large extent invented the wheels which drive our existing understanding of work-based education.

Second, they offer potential models which deserve far greater attention from a national policy perspective for their possible application across a broader spectrum of the work environment. Regardless how successful we are as a nation in upgrading our traditional school-based education system, we must accept that our complex modern environment demands continuous learning. Work-based programs offer the best potential for addressing that demand. However, privately sponsored programs of individual companies and, where jointly directed, their unions, currently cover far less than one percent of all employers. Extending the potential of these programs to a broader spectrum will require public action.

Our capacity to effectively use the new tools of the trade - knowledge, adaptability and flexible skills - will define our success or failure in an environment which will only become more competitive. If we as a nation are sincere in our commitment to education as the foundation upon which we will build the hopes for our future standard of living and that of our children, then we must make a commitment to continuous education.

Kevin O'Neill
Associate Director

ACKNOWLEDGEMENTS

The Center gratefully acknowledges the following people for their participation in the Center's conferences on joint work-based programs, and for their help in the preparation of this report: Bill Dussling and Nick Falcone (AT&T-IBEW Enhanced Training Opportunities Program); Nelson Brooks (Chrysler-UAW National Skill Development and Training Center); Fern Mackour (Bell Atlantic-CWA/IBEW Career Development Program); Walt Dunlavey (USWA-steel industry Institute for Career Development); Ruth Gomez, Lyle Vigil and Barbara Schull (U S West-CWA Pathways for the Future); Cathy Ferguson and Calvin Patrick (BellSouth-CWA Employment Security Partnership); Sally Kohnz (The Brenlin Group); Ken Ross and Don Treinen (AT&T-CWA/IBEW Alliance for Employee Growth and Development); David Craciun and Ron Noble (Packard Electric-IUE Training and Retraining Program); Harold Shields and Ed Smith (Alcoa Corporation); Mary Ann Broderick (Heinz USA Corporation); and Dr. James Van Erden and Mark Troppe of the U.S. Department of Labor. We also thank Bob Stander, Director of Manufacturing for the International Brotherhood of Electrical Workers, and Steve Tomasko, Vice President of Human Resources for The Brenlin Group, for their facilitation of the 1990 conference, and Dr. Van Erden and Assistant Secretary Roberts T. Jones for the co-sponsorship and financial support provided by the Department of Labor.

I would also like to personally thank Gloria Kleiman, Charlie Daniels and Suzanne Shimanuki of the Center staff for their help in arranging the conferences and preparing this pamphlet, and the Center's Director - Ben Fischer - for the guidance, wisdom and counseling he has extended to my own continuous education.

ETOP

(The Enhanced Training Opportunities Program, Inc.)

"A Joint Employee Training Program of AT&T and IBEW"

"A world class team preparing for tomorrow"

ENHANCED TRAINING OPPORTUNITY PROGRAM
AT&T — IBEW

The Enhanced Training Opportunity Program (ETOP) was initiated in 1986 through the joint sponsorship of AT&T Corporation and the International Brotherhood of Electrical Workers:

> To make learning experiences available to AT&T employees represented by the IBEW EM-3 Council which help to enhance their occupational skills, provide opportunities for personal and career development, improve communications skills, increase knowledge of state-of-the-art technology relevant to the present and future needs of the business and increase employee prospects for alternative employment within AT&T or in their community, in the event they are affected by AT&T force reductions.

SCOPE OF ACTIVITIES

ETOP makes a clear distinction between its education-based program and other forms of corporate or job-specific training undertaken by AT&T, although ETOP and AT&T may choose types of programs that overlap. Examples of curricula offered include:

- Health Care
- Management
- American Production & Inventory Control Society
- Personal Development
- Accounting
- Electronics
- Basic Refresher Courses
- Clerical
- Technical
- Computer Training
- Statistical Process Control

In addition, ETOP has developed eight in house computer centers devoted to increasing computer awareness and proficiency for manufacturing employees. These centers were initiated in 1987 by the Local Committees; instruction is conducted by a professional training organization.

ETOP has also established on-site Learning Centers at two manufacturing locations. The Learning Centers are equipped with state-of-the-art computer, audio and visual educational systems. Interactive computer learning programs in a variety of disciplines are available. Full time education counselors, through partnerships with local universities, are available to guide the education process.

ACCESS AND MARKETING

All regular, full-time manufacturing employees of AT&T who are represented by the IBEW are eligible to participate in ETOP activities. [AT&T/IBEW non-manufacturing employees are eligible for education-related activities sponsored separately under The Alliance program covered elsewhere in this document.]

To participate in the program, the employee informs the local committee. If a particular course chosen by an employee does not fall under the Tuition Assistance Program, the committee must file a request, signed by the company business agent and the local union president, for approval by the Co-Executive Directors. The local committee can also apply for an entire class through the same procedures. In this case, the committee may contract out to a local educational institution for instruction to take place on-site.

Some of the following promotional methods have been utilized:

- video tapes explaining the programs.
- designated areas in factories offer visual displays of programs and participants, as well as program schedules.
- closed-circuit, in-plant television with listings of schedules and where to sign up.
- articles in local union and company newsletters.

Not all the courses offered are work-related. Particularly at the outset, classes were offered that might arouse general interest in order to get people into the program.

As with the other programs, ETOP reports that participation is infectious, and that word of mouth resulting from positive experiences can have exponential effects on increased participation. In 1990, the ETOP program had enrolled over 11,000 participants in classes, which is equal to approximately 50% of eligible participants.

ENVIRONMENT

Most instruction takes place on employees' own time, may be held on or off-site, and occurs in both traditional and non-traditional settings.

While there is not currently a literacy assessment program in place, ETOP is developing a needs assessment that consists of a battery of four tests focussing upon spelling, reading, math, and cognitive thinking skills. This helps to validate a multiple entrance, multiple exit style of program based on the individual participant's needs and abilities.

ADMINISTRATION

A Board of Directors, comprised of equal numbers of representatives from IBEW and AT&T, establishes guidelines and procedures for the general operation of the program.

Initially, the ETOP program utilized an oversight committee comprised of equal representation by union and management to approve all vouchers and programs. However, the need for full time administration has led to the appointment of two Co-Executive Directors, one from the union and one from management, who conduct daily operations, manage the program, and distribute funds to meet program objectives as set forth by the Board of Directors. The Co-Executive Directors advise the Board of Directors concerning policies on training, career, personal and job skills development programs, as well as offering advice and professional assistance to the Local Joint Training and Administrative Committees.

Local Joint Training and Administrative Committees, consisting of equal management and union representation, are responsible for assessing the training needs at the locations; applying for necessary funding; and overseeing the effectiveness of the training programs. The Committees also survey local employment requirements, evaluate job skill requirement qualifications for available jobs, and try to match educational opportunities with job market needs. The Local Committees are also responsible for vendor selection and marketing of the program.

Board of Directors:

J. J. Barry, International President, IBEW
J. J. Breslin, Vice President, Labor Relations, AT&T
D. J. Carroll, Jr., President of Switching Systems Business Unit, AT&T
E. A. Keller, System Council EM-3 President, IBEW
J. F. Martin, Quality Development and Information Systems Vice President, AT&T
M. D. Quinlan, International Representative, IBEW
L. C. Seifert, Vice President, Global Manufacturing and Engineering, AT&T Network Systems
R. Stander, Director of Manufacturing, IBEW
{One Management Board position currently open}

Co-Executive Directors:

Nicholas Falcone and William Dussling

FINANCING

The ETOP program was jointly conceived and designed by AT&T and the IBEW, and was included in the 1986 Collective Bargaining Agreement as part of an Employment Security Package. The Agreement sets forth a fixed monthly contribution per regular full-time, IBEW EM-3 represented employee.

ETOP is jointly operated and administered. The Co-Executive Directors maintain a separate checking account for the ETOP into which AT&T makes monthly payments. The Co-Executive Directors are responsible for the disbursement of funds from the account. Any excess funding is carried over into the next fiscal year.

In the case of the computer centers, the local plants pay for the necessary facilities while ETOP pays for computers and instructors.

UAW-CHRYSLER
NATIONAL TRAINING CENTER

2211 EAST JEFFERSON AVE. DETROIT, MICHIGAN 48207 (313) 567-3300

NATIONAL SKILL DEVELOPMENT AND TRAINING CENTER CHRYSLER — UAW

The National Skill Development and Training Center (NTC) was initiated in 1985 as a joint effort of Chrysler Motor Corporation and the United Autoworkers. Its stated mission is as follows:

> In a spirit of cooperation, mutual dedication and joint effort, the mission of the Joint Activities Board is to improve Chrysler's competitive position by implementing mutually agreed upon training programs and projects to increase product quality, employee job security and employee satisfaction from work.

In pursuing this mission, the NTC has three principal goals:

1. To provide opportunities for workers to attain maximum personal growth;

2. To assist workers in acquiring knowledge, skills and abilities to achieve true success and security in their jobs and personal endeavors; and

3. To assist displaced workers in obtaining meaningful and productive employment.

SCOPE OF ACTIVITIES

The UAW-Chrysler National Training Center is responsible for the administration of a wide array of education, training, and employee support programs, as well as dislocated worker programs. In that the July 1990 conference on Work Based Education at Carnegie Mellon University dealt with education and training, with special emphasis on education, we offer a partial list of the major educational programs as follows:

- Tech Prep - a Technical Preparation program designed to provide workers with the basic skills of reading, writing, and mathematics; utilizes some computer work, and can be used to obtain a GED. "TechPrep" is an effort to avoid the stigma that often accompanies programs which utilize the words "literacy" or "illiteracy" in the description; in part, this distinction has helped to make participation in the program enthusiastic.
- Computer Awareness - introduction to technology through the use of micro-computers.
- New Technology Training - in a specially developed, jointly administrated facility, provides workers with training in state of the art and emerging technologies such as laser theory and applications, advanced measuring systems, new generation electronic control technology, composite material theory and applications, etc.
- Tuition Assistance Program - provides financial support for high school completion, the pursuit of higher degrees, and vocational or technical skills; funds are provided in advance of coursework.
- Interpersonal Communication Skills - helps to recognize and improve ability to judge appropriate behavior, manage stress, deal with ambiguity, listen, etc.

- Assessment and Life Career Development - provides professional assessment of worker's academic and self-development needs.
- English for Arabic Workers - 10 week training for Arabic workers in English studies, reading, writing, and speaking.
- Personal Financial Planning - teaches the important elements of personal financial planning, investments, banking, taxes, mortgages, lending,credit, and other related areas.
- Paid Educational Leave - increases knowledge of economic, technical, and political forces influencing the future of the industry.

ACCESS AND MARKETING

All Chrysler employees covered by the collective bargaining agreement, including 64,000 hourly and 10,000 salaried personnel, are eligible for the full array of programs offered. Dependents are also eligible for participation in some programs.

The individual programs have different requirements for access and varying degrees of formality. For example, the Tuition Assistance Program requires submission of an application which is reviewed and approved by the National Training Center. For admission to the TechPrep program members contact the local committee for information.

The program is vigorously marketed to its potential participants through a variety of mechanisms. One of the most successful methods is the "Worker Participation Conference", which brings about 85 randomly chosen people at a time to the National Training Center in Detroit to inform them about the programs that are offered. The conference lasts four days, and all expenses are paid.

In addition, publications and general materials explaining the programs are mailed directly to each employee's home in an attempt to involve spouses in encouraging the workers to take advantage of the program.

Some specific examples of the materials used are:

- a Tuition Assistance Program Works Flyer, describing the program's status, how it has helped, and a "Kudos" section from users.
- a bi-monthly NTC newsletter, describing opportunities and achievements by workers.
- over 30 publications, including a 24 page magazine, written by employees; this literature is also printed in different languages.
- press conferences to announce new programs.
- video tapes for every program.

Finally, word of mouth has helped to accelerate the acceptance and utilization of the program. The willingness to take part seems to be infectious; once a few peers complete the coursework, the program gains greater acceptance among the workers. To date the program has served approximately 41,000 Chrysler employees.

ENVIRONMENT

Instruction takes place in a variety of environments. The setting can be either traditional or non-traditional, and could take place at the worksite, at other training facilities of the company, or off-site. The Chrysler/UAW National Training Center is also developing very non-traditional learning-based environments, including the use of a dedicated technology training center and classes taught via satellite communications. Instruction may be on or off employees' own time, depending on the particular program.

The program utilizes an assessment for literacy which has been developed and implemented in conjunction with the Detroit School Board of Education, and Michigan State University.

ADMINISTRATION

A six member National Joint Activities Board sets policies and guidelines, allocates funding, and monitors expenditures for the program. Additionally, the Board is charged with coordinating the efforts of the National Training Center; evaluating and auditing performance and results of the joint activities; and integrating these activities with the corporate structure and business decisions. Finally, the Board is responsible for keeping the UAW and corporate management informed of the Joint Union-Management activities and the progress of the NTC.

In addition to its own staff, the National Training Center is comprised of equal numbers appointed by the union and the corporation. The Co-Directors are appointed by their respective Co-Chairmen of the Joint Activities Board. The NTC represents the Joint Activities Board in coordinating and evaluating joint activities, as well as in establishing and monitoring budgets, progress and performance. It is also responsible for developing guidelines, procedures, and operational information; pilot programs and their implementation; coordinating requests to the Joint Activities Board; and professional and staff support.

There is some degree of autonomy at the local level to implement programs most fitting to particular needs. Each facility has a Local Joint Training Committee.

The Local Joint Training Committees are comprised of the Local Union President, Chairman of the Shop Committee, Chairman of the Salaried Unit, Plant Manager, and the

Personnel Manager, or designated representatives. The local committees are responsible for marketing the programs at the local level, evaluating requests and approving expenditures on training, and developing the local programs and submitting them for approval.

While the local committees have some degree of autonomy in the design of the program and the selection of a vendor, vendor selection is subject to final approval of the NTC. In general, local committees are required to solicit at least three bids for review. Typically, the vendors are interviewed and make a presentation to the local committee, and a prospectus is submitted to the NTC. The NTC also supplies a reference catalogue of pre-approved vendors.

The NTC also has two Satellite Training Centers and 6 Regional Training Centers that have teleconferencing and distance learning capabilities. A course catalog is being developed for these centers, and will be distributed shortly.

In addition, at the 41 facilities covered by the agreement, 28 have hired a professional educator to assist the Local Committee in carrying out all aspects of its responsibility.

Members of the Joint Activities Board:

Stan Marshall, Vice President, International UAW and Director National Chrysler Department, UAW Co-Chairman

Anthony P. St. John, Vice President, Employee Relations, Chrysler Motors, Co-Chairman

Leonard J. Paula, Administrative Assistant to the Vice President and Director, National Chrysler Department, UAW.

Joan Patterson, Administrative Assistant to the
Vice President and Director, National
Chrysler Department, UAW.

Tod Eschenbach, Director, Union Relations,
Chrysler Motors.

Nelson Brooks, Employee Relations Executive,
Chrysler Motors.

Co-Directors, National Training Center

Nelson Brooks and Joan Patterson

FINANCING

Financing for the program is provided for in the Chrysler-UAW collective bargaining agreement at a fixed rate per hour for straight time hours worked, plus an additional amount for overtime hours worked in excess of 5% of straight time hours.

Funds are disbursed by the National Training Center. All funding expenditures are justified on the basis of the likely contribution to the achievement of the Joint Board's goals as set forth in the Board's mission.

Bell Atlantic

CWA

INTERNATIONAL BROTHERHOOD OF ELECTRICAL WORKERS

CAREER DEVELOPMENT PROGRAM
BELL ATLANTIC COMPANY — CWA/IBEW

The Bell Atlantic — Communications Workers of America (CWA) and International Brotherhood of Electrical Workers (IBEW) Career Development Program consists of two main components: Career Education Programs and Career Resource Centers.

Career Education Programs were established as a result of the 1983 bargaining agreement and offer a variety of tuition-free educational opportunities. While these opportunities for self-development can be useful to employees at all levels throughout their careers, some are especially useful to Associates seeking advancement through the upward mobility process.

Career Resource Centers have been established at three sites as a result of the 1989 bargaining agreement between the CWA, IBEW and the Bell Atlantic Network Services Group Companies. The Career Resource Centers were developed to enable Associate employees to become actively involved in their own career development. Centers can help employees assess their skills and interests, set career goals, review career options and develop an action plan to reach goals. Employees can also get help where there is a possibility of job displacement.

SCOPE OF ACTIVITIES

The Career Resource Centers provide one-on-one career counseling, aptitude and vocational interest testing, and multi-media support materials. The media resources span a wide range of career development topics, self-motivational themes, and specific skills-building subjects. Audio and video materials are available for use on the premises; cassette players may also be borrowed. Center Libraries have information on current upgrade and transfer specifications and application forms for each of the Network Service Group companies, as well as local college catalogues and information on the various Bell Atlantic educational self-development programs.

Major programs available through the Career Education Programs include:

Aim To Learn And Succeed (ATLAS) Education
These in-house, instructor-led programs offer career and personal development courses designed to help employees seeking: preparation for Company qualification tests or assessment activities; improved performance in their current job or one to which they aspire; and/or a basic foundation for further education and personal development. Available courses include:

- Individualized Math and Verbal Skills
- Write Right
- Test Taking and Thinking Skills
- Stress Management
- Working with Personal Computers
- Money Management
- Human Relations in Business
- Planning for Retirement
- Fundamentals of Excellence
- Speaking to Communicate
- Developing Career Options

Home Study

Home Study courses meet some of the basic skill and knowledge needs of employees who cannot attend classes in a traditional school setting and/or have interest in technical subjects related to skilled craft jobs. Available courses include:

- Math
- Business English
- Data Processing and Computer Basics
- Introduction to Telecommunication Technology
- Electronic Switching for Telephone Systems
- Basic Electricity
- Basic Electronics

Tuition Assistance Plan (TAP)

TAP will pay 100% of tuition and most mandatory fees for a broad range of courses. Courses must be taken at an institution accredited by one of the agencies listed in the Plan. Courses must relate to a current job or a career aspiration within Bell Atlantic. TAP covers credit, non-credit, degree and non-degree courses including correspondence courses. Participants are required to repay the Company for courses not completed with at least a "C" or better, or a "Pass" in a Pass/Fail System.

Program on Noncollegiate Sponsored Instruction

Employees pursuing an undergraduate degree (Associate or Baccalaureate) may be able to save time and money through the Program On Noncollegiate Sponsored Instruction (PONSI), which is coordinated by the American Council on Education (ACE). Over 150 Company courses carry the college credit recommendation, and PONSI is a way to receive double value for those courses. Unlike Continuing Education Units, PONSI can help translate the Company courses into actual college credit.

ACCESS AND MARKETING

The Career Education Programs are available to all Bell Atlantic employees on a voluntary basis during non-working hours. All 70,000 regular employees are eligible to participate from the date they are hired.

The Career Resource Centers are available to all Associates. Each Career Resource Center is open for twelve hours daily from Monday through Friday, and Saturday by appointment. Associates must use the Centers on their own time but may come on Company time in the case of job displacement.

Collectively, these programs average over 20,000 course enrollments per year.

ENVIRONMENT

The Career Education Programs offer a wide range of contexts for employee educational development. Courses may be taken through in-house Company offerings, at home or at accredited institutions. In-house courses in the ATLAS program are usually scheduled at convenient Company locations or at community colleges. On-site career education courses are ?d by professional instructors.

ADMINISTRATION

Three separate Training Advisory Boards (TABs) provide on-going administration and oversight for the Career Education Programs in the three Operating Telephone Companies (Bell of Pennsylvania; New Jersey Bell; and the Chesapeake and Potomac Telephone Companies, which serve Maryland, the District of Columbia, Virginia and West Virginia). The

Training Advisory Boards consist of members from the Operating Telephone Company involved, the CWA and the IBEW.

A joint management and union implementation committee was responsible for planning and establishing guidelines for the Career Resource Centers. Each Resource Center is staffed with certified career guidance counselors.

FINANCING

The 1989 bargaining agreement established that it is the company's responsibility to meet the operating costs of the program.

Institute for Career Development, Inc.

INSTITUTE FOR CAREER DEVELOPMENT
USWA — VARIOUS STEEL COMPANIES

The Institute for Career Development was initiated through collective bargaining in 1989 between the United Steelworkers of America and various steel companies. At this time, all of the major companies are participating members; some smaller companies are affiliated with the Institute as service users.

During the industry-wide bargaining that began in 1989, the Institute's mission was defined as:

> ... to provide support services for the education, training and personal development of the employees of (participating companies). This will include upgrading the basic skills and educational levels of active employees in order to enhance their ability to absorb craft and non-craft training; their ability to progress in the workplace; their ability to perform their assigned work tasks to the full extent of their potential; their knowledge and understanding of the workplace; and of new and innovative work systems. This will also include education, training and counseling which will enable employees to have more stable and rewarding personal and family lives; alternative career opportunities in the event that their steelworker careers are subject to dislocation; and long, secure and meaningful retirements. ...

SCOPE OF ACTIVITIES

Although still in formative stages, the activities and programs of the Institute are intended to be structured to meet the specific needs of participating companies and tailored to the specific needs of work locations. In general, the philosophical underpinning of the Institute is that workers themselves must play a significant role in the design and development of their training and education programs. The Institute facilitates this by:

- providing support services for the education, training and personal development of workers.
- providing leadership, guidance and expertise in the design, development and delivery of training and educational programs that will allow workers to have more stable and rewarding personal and family lives while meeting the requirements of the rapidly changing work environment within the steel industry.
- supporting new, non-traditional approaches to learning that build on workers' accumulated knowledge and skills.
- seeking out and making use of the most effective and modern methods and educational technologies, developing such technologies where none exist, and utilizing a curriculum and instructional program based on competencies required in the workplace and in the worker's personal lives.

ACCESS AND MARKETING

All USWA-represented employees of participating firms are eligible to participate in any training or education program supported by the Institute. Marketing is accomplished through joint site-level committees, newsletters and other promotional materials.

ENVIRONMENT

Local joint union-management committees at each location work to identify employees' educational interests, goals and preferences. A non-aligned support staff with backgrounds in education, counseling and human resources assist the local committees in determining educational goals and needs, contacting suppliers of assessment, education and evaluation products, and providing counseling and guidance services.

ADMINISTRATION

Overall policy development and guidance of the Institute is provided by a joint governing board of directors comprised of top-level representatives of participating companies and an equal number of union officials. An Advisory Board oversees implementation, and is comprised of company representatives, union district directors, technicians and local leaders whose interests and expertise can contribute to the Institute's work.

Administration of the Institute's activities is headed by a non-aligned director selected by the governing board.

Director: James Murry

FINANCING

Funding support for the Institute is established in each of the separate existing labor agreements between the union and the respective companies. Corporate funding contributions are on a fixed sum or variable amount per- hours-worked per month basis. Supplemental funding may also accrue through proceeds from penalties assessed against firms for overtime work.

PATHWAYS TO THE FUTURE
U S WEST — CWA

PATHWAYS To The Future is the U S WEST and Communications Workers of America (CWA) joint training and education program. Its roots lie in the collective bargaining agreement of 1986 between Mountain Bell Telephone Company and the CWA. The collective bargaining agreements signed in 1989 brought together into a single program the training and education efforts of CWA and the three former operating companies which became U S WEST Communications — Mountain Bell, Northwestern Bell, and Pacific Northwest Bell.

Promotional material for the PATHWAYS program defines the mission as:

> The purpose of PATHWAYS is to promote lifelong learning through educational opportunities which meet individual needs, provide personal and career choices, and create a flexible and skilled workforce so that the employees, the Company, and the Union are prepared to fully participate in a changing and diverse marketplace.

SCOPE OF ACTIVITIES

PATHWAYS provides up to $1,800 per calendar year in prepaid tuition for courses taken on non-work time to upgrade skills and prepare for careers within or outside the Company. Up to $300 per year may be used for personal growth courses. Both credit and non-credit courses are available at eligible institutions and educational providers. In addition, PATHWAYS prepays requisite student fees and reimburses employees for required books upon course completion. Career counseling, assessment, and workshops available through the PATHWAYS network are provided at no cost. Participants must submit a career education plan, but may take up to two courses before doing so.

ACCESS AND MARKETING

PATHWAYS is available to approximately 38,000 employees across a fourteen-state region. Most are represented by the CWA or the International Brotherhood of Electrical Workers (the IBEW) in Montana. All regular occupational employees of U S WEST Communications who have at least one year of employment are eligible to participate in PATHWAYS. Also, regular employees who are notified of potential dislocation from their current jobs or demotion to a lower rate are eligible regardless of length of service. Employees who elect to receive voluntary separation payments on a bi-weekly basis are eligible for PATHWAYS for eighteen months from the date of their separation.

The PATHWAYS network includes representatives in colleges, universities, and technical schools, as well as within the Company and the unions. Union Advocates are unique to PATHWAYS. They are volunteers appointed by their local Union President, who assist in marketing the program.

ENVIRONMENT

Instruction takes place in various environments, including traditional and non-traditional settings. Eligible training and education providers include private as well as public colleges, universities, and technical schools. While participants generally attend classes at a school's location, some classes are offered on-site. Also, various distance learning methods are utilized, such as correspondence study and computer-based learning.

ADMINISTRATION

PATHWAYS is governed by a joint nonprofit corporation, Training Partnerships, Inc. (TPI). The TPI Board of Directors has developed a Business Plan that reflects the program's long-term, comprehensive, and employee-centered philosophy.

Two Co-Directors appointed by U S WEST and the CWA have overall responsibility for implementing PATHWAYS and providing leadership and support in achieving the desired outcomes requested by the board. Administrative functions are managed by the Council for Adult and Experiential Learning (CAEL).

Board of Directors

Thomas Burns, President, CWA
R. Lyle Vigil, Chair, U S WEST
Ruth Gomez, Vice President, CWA
Ron Harrison, Treasurer, U S WEST
Dale Feller, CWA
Richard Johnson, CWA
Jack Methven, U S WEST
Linda Pancratz, U S WEST
Gary Spendlove, U S WEST
Randy Warner, CWA

Co-Directors: William Frazee and Barbara Shull

Program Director: William Uebelher, CAEL

FINANCING

Funding for PATHWAYS To The Future was provided under the 1989 collective bargaining agreements, for a fixed amount, over the three year period of the contracts. PATHWAYS is separate from US WEST Communications' job specific training.

BELLSOUTH

EMPLOYMENT SECURITY PARTNERSHIP
BELLSOUTH — CWA

In the 1980s, BellSouth and the Communications Workers of America began placing increased emphasis on continuing education as a complement to an already strong program on job training. This added emphasis was focussed upon the combined aspects of training, retraining, career preparation and personal development in recognition of advancing changes in technology, markets, organizational structures and career aspirations.

In 1989 the company and union bargaining efforts formed the Employment Security PARTNERSHIP covering employees in the nine state region serviced by BellSouth. The PARTNERSHIP's mission is to provide information and support that can help employees meet the fundamental requirements of jobs in the coming years: skill, knowledge and flexibility.

SCOPE OF ACTIVITIES

The PARTNERSHIP program incorporates a three-step approach as a means of assisting employees in anticipating and preparing for future changes.

1. Exploration

Employees may attend the following workshops to help identify areas where they may want or need to learn something new. Each employee who attends one of these workshops is entitled to confer with a professional career counselor on company time for recommendations.

- Career and Life Planning Workshop - provides guidance in setting career goals and planning a career path.
- Test Orientation Program Workshop - helps an employee reduce the anxiety associated with test-taking and provides simulated testing situations for company assessments.
- Career Strategies: It's Your Move - provides practical help for identifying career moves andpractice in resume-writing, interview techniques and negotiating skills.
- Learning Today for Tomorrow - helps an employee prepare for enrollment into course work at the accredited school of higher learning he or she chooses. To make the return toschool smoother, note-taking and test-taking skills are covered as well as the contemporary "language" of college campuses.

2. Skill-Building

- General Skills Training - refresher courses in reading, writing, arithmetic and an introduction to using personal computers.
- Speak With Success - effective communications, persuasive speaking and parliamentary procedures.
- Training/Retraining Program - pays tuition and fees for skills updating courses taught through accredited schools.

- Tuition Aid Plan - reimburses tuition costs for accredited college coursework in fields that build skills for present and future company jobs; participants may obtain undergraduate and graduate degrees.
- College Network - was initiated in conjunction with the American Association of Community and Junior Colleges to help meet employees' college needs.
- Correspondence Courses - ranging from basic math and grammar to advanced electronics and telephony, for employees who want to pursue self development without the demands of classroom attendance.

3. Practical Application

The PARTNERSHIP helps employees find ways to master skills of their present jobs, provides constructive ways to think about career changes and identifies areas outside the workplace where an employee can gain enrichment by contributing.

Employees have given the PARTNERSHIP outstanding ratings in company surveys. Awareness of the need to gain new skills has increased, and employees report that they are getting better information about jobs and career development. Participants say they feel more empowered and better able to manage their own careers.

ACCESS AND MARKETING

The Employment Security PARTNERSHIP program is open to all regular, full-time employees in union-represented jobs. Nearly 60,000 employees, or 95% of those eligible, have attended a two-hour orientation on company time. The orientation is provided by joint Bellsouth-CWA teams, and features a videotape "guided tour" presentation. Attendees are provided with applications, and those indicating interest in a particular program are contacted by direct mail.

The PARTNERSHIP program and its success stories are featured in general and specific media directed to employees. Of those attending the orientation 75% have indicated interest in pursuing workshops or courses on their own time, and nearly 25% have done so to date.

ENVIRONMENT

Orientation and career counseling occur on company time at the employee's work place. The workshops take place at accredited colleges, at work locations or at the union halls. Courses taken under the Tuition Aid Plan and the Training or Retraining Programs through accredited schools are usually held on the school's campus.

ADMINISTRATION

General direction and guidance for the PARTNERSHIP program are provided by an Employment Security Advisory Board (ESAB) consisting of five members each from the company and the union. The ESAB meets quarterly and is responsible for:

- Furnishing advice to BellSouth on personal or career development and job displacement training courses and curricula.
- Reviewing and making recommendations regarding available training delivery systems.
- Evaluation of the program's effectiveness.
- Encouraging successful participation.

Regional Career Resource Centers are strategically located in the nine states served by BellSouth and are staffed by CWA and company Field Coordinators to help facilitate participation of all interested employees.

FINANCING

Funding for the PARTNERSHIP program was established under a formula fixed during the 1989 collective bargaining agreement. Maximum funding could reach $25 million over the life of the agreement, which expires in August of 1992.

The Brenlin Group

THE BRENLIN GROUP

The Brenlin Group is a diversified business organization whose principal operating units are in the steel and automotive/ transportation supply industries. The educational programs at Brenlin's operations are unilaterally administered by management. Consultation with local union or other employee representation groups on program design and implementation occurs at some sites.

SCOPE OF ACTIVITIES

Educational programs offered by The Brenlin Group focus primarily upon upgrading basic literacy and numeracy skills. Many of the courses are taught through the assistance of computers, such as:

- Math I, II - basic math skills, fractions, decimals, percentages systems of measurement.
- Algebra I, II - elementary and advanced algebra.
- Geometry - basics of theorems and postulates.
- Reading I through IV - audio and visual techniques starting at beginning level reading, moving through inferences, predictions, analysis and conclusions, to comprehension and finally high school equivalency.
- Introduction to computers - how computers were developed, how they work, and what they can do.

- Typing, Word-processing.
- Social Studies - American history, political science, economics, geography, and behavioral sciences.
- Science - fundamentals of physics, chemistry, biology and earth science.

The programs also include coursework taught through more traditional means, including:

- Guided Reader - develops reading speed and comprehension from elementary school to college levels.
- Read Card Program - basic literacy skills, improved reading levels and better comprehension.
- Word Code Program - improves spelling and visual memory skills.
- Workplace Reading Skills - reading and understanding reports, directions, manuals and machine operations in the workplace.
- GED Program.

Brenlin also offers a summer program for employees' children at the Centers.

ACCESS AND MARKETING

Educational programs are open to all employees at Brenlin's sites where such programs have been established. A great deal of emphasis is placed upon confidentiality and rewards.

The program is extremely flexible due to the adaptability afforded through the use of computers, and a participant can start at any time provided there is a computer available.

An individual test is used to determine placement levels. The test, which requires approximately three hours to complete, is administered by a professional educator on-site, scored immediately and destroyed. Scores are recorded in special codes to protect the confidentially of participants and the credibility of administrators.

A variety of methods are used to promote the program, including a system of reinforcements for successful completion of prescribed learning activities. For instance, upon successful completion of the program, certificates of achievement have been awarded at open assemblies; gift certificates for local retail establishments and restaurants have been awarded; and time off with pay has been given when an employee has completed 30 hours of center instruction at a minimum 80% success level.

ENVIRONMENT

Instruction takes place on-site at Brenlin's Learning Centers on the employee's own time; provisions have been made to accommodate shift workers. Family members are also eligible to participate in some aspects of the program.

The program was designed through a needs assessment process to determine what coursework would be pertinent to the facility. Meetings with employees to determine their wants and needs are included in this assessment process. This is an on-going procedure which ensures that the program is constantly evolving and responsive to the needs of both the employees and The Brenlin Group.

Although there is a large amount of self-paced computer based learning, if an employee encounters problems while working in a program, educators at the center will guide them to workbooks that will assist in completing the program. For

example, a message to contact the educator will appear on the user's screen when a specific number of incorrect answers is detected by the software program. The educator can go back into the program for more specific questions that the participant was having difficulty with, and can then formulate recommendations and remedial measures.

ADMINISTRATION

The Brenlin Group employs a Learning Resource Centers Manager who is responsible for the physical design of facilities and the ordering of all material used in the centers. The Manager works with professional educators in the curricula design. Typically, there are informal meetings between the Manager, Human Resources personnel, and the professional educators to discuss current issues.

Brenlin also employs a professional educator at each site, whose function is to assist in the design of the center curriculum.

While the program is not jointly sponsored nor administered, there are voluntary committees that help the program develop and evolve, set the scheduling, and take care of marketing the program.

The activities of the Learning Centers are coordinated by Stephen J. Tomasko, Vice President of Human Resources for The Brenlin Group.

FINANCING

The level of financial support afforded to these activities is established by the management of The Brenlin Group.

THE ALLIANCE FOR EMPLOYEE GROWTH AND DEVELOPMENT, INC. AT&T — CWA/IBEW

The Alliance for Employee Growth and Development is jointly sponsored by AT&T Corporation and its principal unions, the Communications Workers of America (CWA) and the International Brotherhood of Electrical Workers (IBEW). Established in 1986, The Alliance has defined its mission as follows:

> AT&T Corporation, the Communications Workers of America, and the International Brotherhood of Electrical Workers share a vision that the growth and development of the individual is the key to success in a competitive marketplace.
>
> The Alliance for Employee Growth and Development was born out of this shared vision to serve as a resource to individual employees who want to take charge of managing change in their own lives.
>
> The Alliance mission is to support individual efforts to develop career and personal growth and enhance employability through continuing learning experiences. The success of these individual efforts will be assured by the cooperative activities of The Alliance, CWA, IBEW, and AT&T.

SCOPE OF ACTIVITIES

The Alliance provides a range of support programs and services for both active and displaced employees of AT&T, including:

- Basic Skills Upgrade - assists workers in improving basic skills in mathematics, reading, English-as-a-Second-Language, and preparation for GED.
- Career Assessment and Planning - helps participants to establish individual short and long term personal and career goals; includes assessment and counseling components through self-paced workbooks, remote individual counseling and group activities.
- Return-To-School Program - equips participants with tools and knowledge needed to successfully return to school; may include development of study skills and time management, as well as information regarding financial aid and what is expected of students in a school setting.
- Vocational and Interest Surveys - identifies essential background information, personal goals, and interests of the workers.
- Job Search (Active and Displaced) - features group sessions that provide assistance with resume preparation, interviewing skills, internal/external labor market information, and self-directed job seeking skills.
- Occupational Skills Training - accelerated skills training in demand occupations.
- Personal Financial Planning - overview of financial planning terms and concepts, and fringe benefits; participants develop their own financial development plans.

- Pre-Paid Tuition - provides tuition for courses of study relating to participant's Career Action Plan at accredited institutions.
- Pre-Retirement Program - assists in making the transformation from the work environment to retirement; topics include health concerns, lifestyle changes, financial planning and future employment/ activity options.
- Qualifying Exam Preparation - emphasizes personal and career development, with some retraining courses for displaced workers.
- Relocation Planning Workshop - provides planning and information seminars on aspects of relocation, including household moving, new housing, family stress, medical care availability, and other relevant community profile information. This is a copyrighted program by The Alliance.
- Other Personal Development Programs - including time management, family counseling, communication skills, stress management, etc.

The jointly sponsored Alliance maintains a clear separation between its programs and AT&T's job-specific training programs.

ACCESS AND MARKETING

The Alliance program is available to all full-time or part-time employees of AT&T who are bargaining unit members represented by either the CWA or the IBEW. {AT&T/IBEW manufacturing employees are eligible for education-related activities sponsored separately under the Enhanced Training Opportunity Program covered elsewhere in this document.}

To enroll in the program, the employee completes a one page application and, with the assistance of Alliance personnel, develops a career plan intended to help ensure that he or she is working toward a defined goal. Eligible activities are those which support an internal or external demand occupation or career plan, as well as upgrading of basic skills and social skills development.

Direct marketing of the program is the responsibility of Alliance Local Committees ("ALC"s), which maintain on-going communications with the workforce through media such as "Alliance Update" flyers describing opportunities and proposed programs. Word of mouth is also a very potent tool, and responding to demand has been a problem since the program's inception.

The ALC's also provide the direct link to developing and reinforcing a sense of accomplishment among participants. For example, one AT&T plant closed down for two hours in order to celebrate, complete with caps and gowns, the participants' completion of a GED program.

To date, the program has been utilized by over 65,000 employees and course enrollments have totaled 132,000.

ENVIRONMENT

Instruction takes place on-site or at private and public schools, and may be traditional, self-paced, and/or computer based.

The Alliance currently utilizes some form of literacy assessment in the career planning program, but is also developing data on assessment methodologies and literacy curricula via independent research conducted by its own staff.

The Alliance uses employment retention as one evaluation of the program's effectiveness. For example, 1700 people scheduled for lay-off in 1988 were retained through the efforts of The Alliance. Another measure of success is placement in the external labor market: The Alliance has commissioned a nationwide study that is currently underway in AT&T's operator services organization to evaluate placement results.

ADMINISTRATION

Policy guidance and general direction are provided by a six member Board of Trustees. Two Co-Executive Directors, one appointed by the President of the CWA and the other by AT&T's Vice President of Labor Relations, are responsible for overall management and administration of The Alliance, including the selection of the Director in charge of programmatic operations.

Regional support offices staffed by Alliance professionals serve and support Alliance Local Committees (ALC). Committees are on-site, and really are the central figure in the program, with a very high degree of autonomy in selection and implementation of the programs for each site. The local committee is on a voluntary basis, and is responsible for needs analysis, vendor selection, making request proposals, scheduling, and marketing. Although the program is voluntary, employees are compensated at their normal wage rates for committee work done during normal working hours.

Typically, the ALC's are formed with equal representation from both management and union. These committees provide information about The Alliance program and distribute surveys that help determine the needs and desires of the local workforce.

From the results of these surveys, the local committees develop a schedule of programs to be offered, and solicit workforce approval on the tentative offerings.

Upon culmination of the programs, the local committee evaluates the programs and the vendors, and relays these evaluations to The Alliance. Throughout the process The Alliance provides guidance to the local committees.

Board of Trustees

Morton Bahr, President, CWA
John Barry, President, IBEW
Jim Irvine, VP for Communications/ Technologies, CWA
William Ketchum, Corporate VP, Labor Relations, AT&T
John O'Neill, Executive VP, Network Systems Products, AT&T
Paul Wondrasch, President, General Business Systems, AT&T

Co-executive Directors: Kenneth Ross and Donald Treinen

Program Director: Marshall Goldberg

FINANCING

Funding for The Alliance was initially negotiated in the collective bargaining agreement of 1986, which allows for a fixed monthly contribution per full or part-time union represented employee.

The Co-Executive Directors are responsible for disbursing and managing funds.

PACKARD ELECTRIC

Division of General Motors Corporation

TRAINING AND RETRAINING PROGRAM
PACKARD ELECTRIC - IUE

Employees of the Packard Electric Division of General Motors Corporation in Warren, Ohio, are eligible to participate in the broad-based educational activities made available through the GM/UAW National Training Center. However, Packard and the International Union of Electronic, Electric, Technical, Salaried and Machine and Furniture Workers (IUE) have jointly developed a local complement to these programs that is a mixture of technical and social training activities.

SCOPE OF ACTIVITIES

The Packard/IUE program focusses upon providing formalized training about the firm, its markets and the competitive forces shaping the firm's abilities to operate successfully in those markets. This formalized program stresses the dependent relationships of the internal components of the organization; each employee must therefore develop a clear understanding of the expectations of his or her customers within the organization, and performance is evaluated based upon the ability to meet those expectations. As a result of this perspective, the Training and Retraining program tends to stress skill development activities which have direct relationships to job requirements. In addition, the program

currently encompasses broader educational activities in the areas of time management, health care, stress management and training in participative work systems. The program is being expanded in the areas of math, reading/writing, and computer literacy.

ACCESS AND MARKETING

All Packard employees are eligible to participate in any training program in existence at Packard by requesting permission from the training coordinator. Certain elements of the Training and Retraining Program are, however, mandatory as a condition of employment.

ENVIRONMENT

Training can take place on site or at a common division center, and occurs during company time. The division centers take care of smaller class sizes and do not overlap with more traditional forms of local training.

Most employees are covered by Packard's "Lifetime Job & Income Security Agreement", whose stated purpose is to provide a workplace environment that will improve operational effectiveness and stimulate efforts to understand and meet the competitive needs of the business.

Training curriculum is developed on the basis of customer needs, through a complex and formal intra-organizational definition of accountability. The training program establishes the curriculum to enhance and develop new skills where necessary.

ADMINISTRATION

To administer the Training and Retraining program, Packard employs a full time training coordinator who designs and implements social change through training, and encourages employee involvement within the corporation. The coordinator also submits expenses to the division head for authorization.

Packard also has a divisional Joint Union-Management Committee which approves local training expenses to be submitted to the GM National Training Committee in Detroit for funding approval for programs that meet certain criteria via the IUE collective bargaining agreement. The requirements for eligibility are that the program provide joint support of the operating goals of the division, and support the development of new skills.

Absenteeism, customer complaints, and quality are used as measures of the program's effectiveness.

Organizational Development Consultant: Ron Noble
IUE Divisional Training Representative: David Craciun

FINANCING

Funding for the Training and Retraining Program is established by division management.

Funding for educational programs is established under the IUE-GM contract at a fixed rate per hour, plus an additional amount for each overtime hour worked in excess of 5% of total straight time hours.